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## Losing Tropicana but on the whole a NETgain

'Ease of use' is what most advisers want from their financial planning software according to a new survey of more than 200 practices.

The survey which was undertaken by research house Investment Trends on behalf of Asgard Wealth Solutions found that more than half of the advisers surveyed rated 'ease of use' as the number one factor when it came to choosing planning software.

An ability to easily produce plans for clients with complex investment needs, as well as a facility to efficiently undertake scenario modelling for clients, came in as second and third on the advisers most wanted list.

Additionally, 94 per cent of those surveyed said they would prefer, or would strongly prefer, to conduct planning tasks and product administration through one integrated system, finding it frustrating to have to switch between multiple solutions to undertake tasks.

Production of clients' statements of advice (SoAs), customer relationship management (CRM), and managing workflow were the top three business activities pinpointed by advisers as being in need of better technological support than is now available, with the majority stating that the production of SoAs and lack of software integration caused them the biggest headaches in terms of inefficiency.

The release of the survey results coincides with the unveiling of a new name for Asgard Wealth Solutions' integrated planning and practice management software package which is currently under development and will be available to advisers from the end of the year.

With a former working title of 'Tropicana', the new package will now carry the brand AdviserNETgain.

According to the company's director of distribution and sales Wayne Wilson the new name evolved naturally out of the company's key objective which was to create a software solution that allowed advisers to gain efficiency, gain productivity, and gain time to spend with clients.

"It was also logical to capitalise on the name of our existing platform software adviserNET which has won multiple industry awards including being voted by planners in Investment Trends surveys as the best online service for advisers for the past three years," he said.

"AdviserNETgain will also be the single portal through which users of the new solution will access adviserNET, so the choice of name seemed perfect."

Mr Wilson said the company planned for the new integrated solution to be of the next generation – advice-centric and user-friendly.

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“The objective is to have one system with a single data entry point that seamlessly integrates an adviser’s front office processes with their back office activities,” Mr Wilson said.

“With AdviserNETgain we are talking about a total business solution. We will integrate our platform software (adviserNET) with our financial planning software (ASSIRT Software) and roll-out CRM, workflow and portfolio planning tools into one package,” he said.

“The research showed that those surveyed use multiple applications to service their clients and run their businesses.

“We know, for example, that practices on average are currently maintaining two client management systems,” he said. “Our objective with AdviserNETgain is to get this down to one.

“AdviserNETgain will support efficient client management and address the requirements of running a successful and profitable advice practice,” Mr Wilson said.

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